

# Family Document Checklist

It's important to know how to access important documents when the need arises. A copy of this checklist should be readily available to your spouse, partner or other loved ones and should be stored in a safe location. For items stored in the home, you may want to list the specific location of the documents for easy retrieval.



## Important Phone Numbers:

Professional	Name	Phone Number
Accountant	_____	_____
Attorney	_____	_____
Financial Advisor	_____	_____
Insurance Agent	_____	_____

## Emergency Papers Location

Power of Attorney	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Safe Deposit Box Key	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Living Will	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Health Care Proxy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Organ Donor Card	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Burial Instructions	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Cemetery Plot Deed	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Other: _____	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____

## Investment Documents Location

Investment Statements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Annuity Statements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Annuity Policies	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Stock Certificates	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Other: _____	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____

## Bank & Credit Accounts Location

Credit Cards	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Bank Statements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Checks	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Certificates of Deposit	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Savings Bonds	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____
Other: _____	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home _____



**Non-Financial Papers Location**

- Birth Certificate(s)  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Adoption Papers  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Citizenship Papers  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Military Discharge Papers  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Social Security Card(s)  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Marriage Certificate  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Medicaid/Medicare Info  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Prescription Plan Card  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Other: \_\_\_\_\_  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_

**Financial Papers Location**

- Real Estate Deed  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Mortgage Documents  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Income Tax Returns  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Automobile Titles  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Rental Agreements  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Lease Agreements  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Partnership Agreements  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Employer Comp Plans  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Promissory Notes  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Trust Documents  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Last Will & Testament  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Other: \_\_\_\_\_  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_

**Insurance Documents Location**

- Life Insurance Policy(ies)  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Group Life Policy(ies)  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Long-term Care Policy  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Disability Policy  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Veterans Administration  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Travel Insurance Policy  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Mortgage Insurance Policy  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Auto Insurance Policy  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Homeowners Policy  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_
- Other: \_\_\_\_\_  Office  Safety Deposit Box  Attorney  Home \_\_\_\_\_

